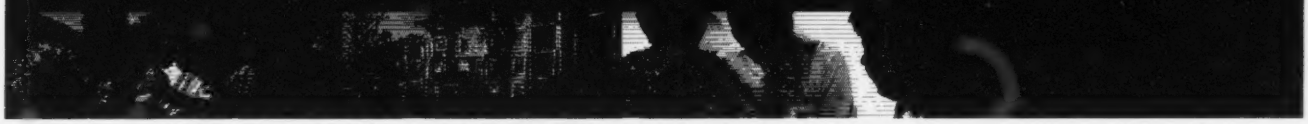
HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Manitoba



CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2012

Highlights

- The overall vacancy rate for standard spaces in retirement homes across Manitoba stood at 4.8 per cent in 2012 compared to 7.1 per cent in 2011.
- The overall average rent for a standard retirement space in Manitoba was $2,338 in 2012, compared to $2,227 one year earlier.
- In Manitoba in 2012, there were 31 facilities surveyed containing a total of 3,473 spaces and housing 3,753 residents.

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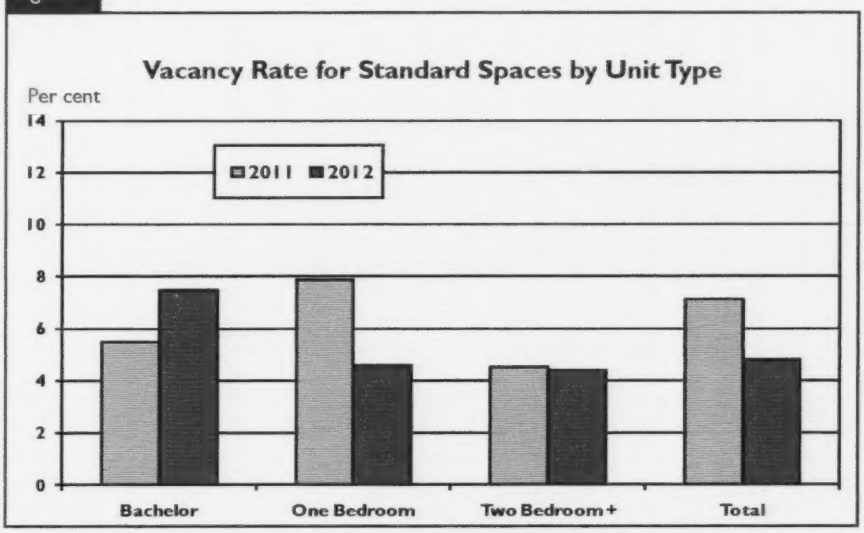

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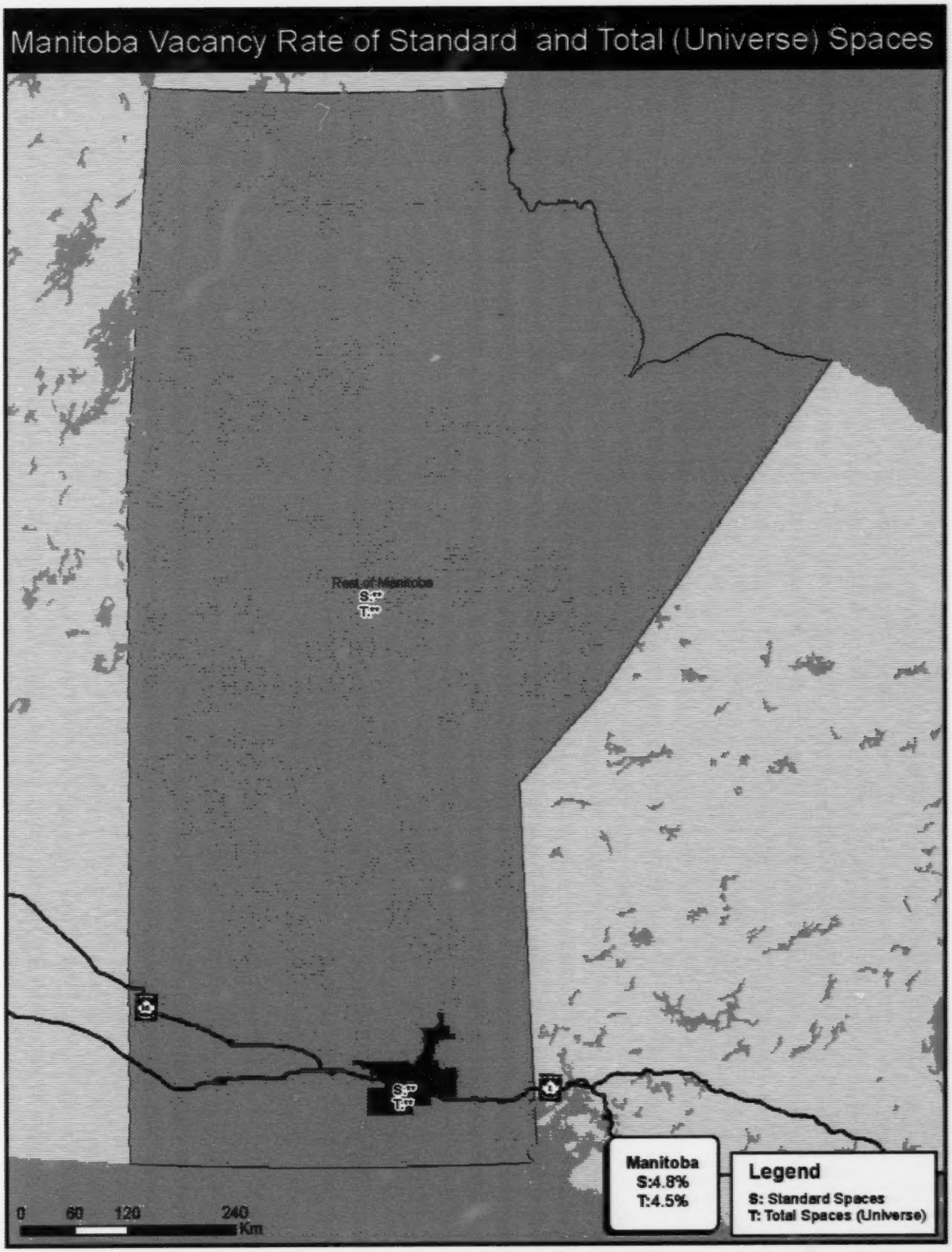

Manitoba Vacancy Rate of Standard and Total (Universe) Spaces
Rest of Manitoba
S:**
T:**
S:**
T:**
0 60 120 240
Km
Manitoba
S:4.8%
T:4.5%
Legend
S: Standard Spaces
T: Total Spaces (Universe)

Vacancy

Vacancies move lower

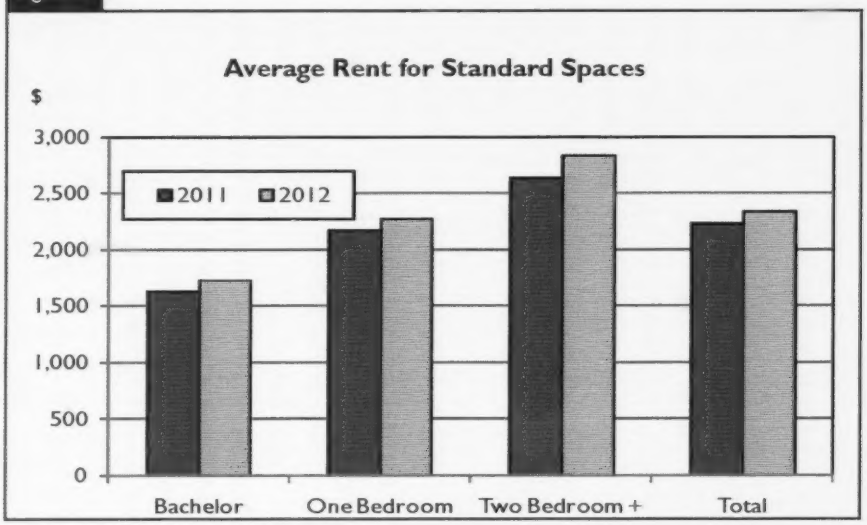
According to Canada Mortgage and Housing Corporation's (CMHC) Senior's Housing Survey, the vacancy rate in senior's rental residences in the province of Manitoba was 4.8 per cent in 2012, compared to 7.1 per cent in 2011. The seniors' survey targeted only private and non-profit retirement structures where the majority of residents are age 65 and over and have access to additional services not offered in traditional rental structures such as meal service, housekeeping, and laundry.

The vacancy rate in Manitoba's seniors' rental residences in bachelor spaces was 7.5 per cent in 2012 compared to 5.5 per cent in 2011. This was also the highest vacancy rate by bedroom type this year. Vacancies declined the most in one bedroom spaces which had recorded the highest vacancy rate at 7.9 per cent in 2011, posted a vacancy rate of 4.6 per cent in 2012. The lowest vacancy rate continues to be in spaces with two bedrooms or more where the vacancy rate was 4.4 per cent in 2012, almost identical to the 4.5 per cent posted one year earlier.

Vacancy rate decreased in upper rent range

As was the case in 2011, the highest vacancy rates in the province this year were recorded among those spaces with the highest rents. This is also the category that saw the greatest decrease in vacancy. Spaces renting for more than $2,500 per month recorded a vacancy rate of 6.0 per cent in 2012, down from 15.4 per cent in 2011. The lowest vacancies were recorded for spaces renting between $1,500 and $1,999, where the vacancy rate of 2.5 per cent in 2011 moved to 2.3 per cent in 2012. This is less than half of the 4.8 per cent overall vacancy rate for Manitoba. Vacancy rates for spaces renting between $2,000 and $2,499 moved from 4.2 per cent in 2011 to 5.4 per cent in 2012.

Figure 2



Source: CMHC

Rents

Average monthly rents move higher

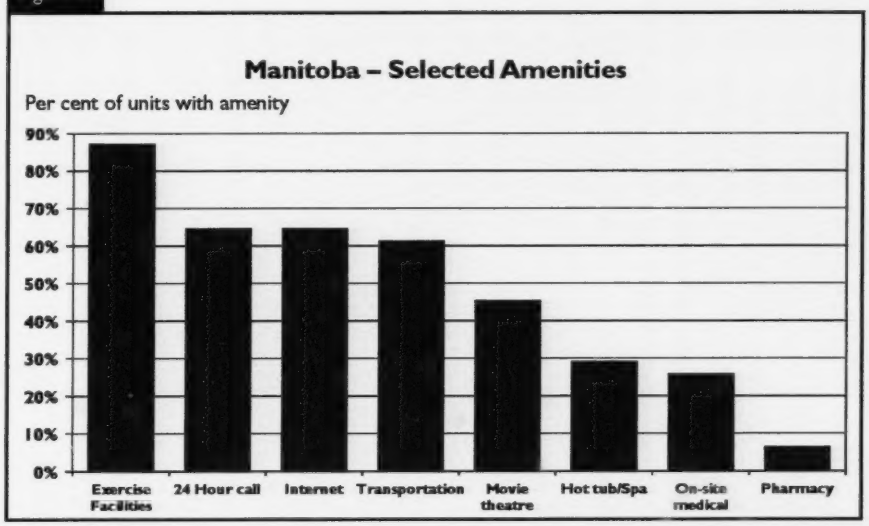
The average rent charged for seniors' Standard Spaces of all types on a province-wide basis in 2012 was $2,338 per month, compared to $2,227 in 2011. The largest change in average rent was in two bedroom + spaces where the rent advanced from $2,638 in 2011 to $2,834 in 2012. Bachelor spaces reported an average rent of $1,730 in 2012 compared to a monthly average of $1,630 in 2011.

Reviewing the universe of spaces by rent range, the largest share of spaces, at 42 per cent, rented for more than $2,500 per month. By comparison, only 30 per cent of spaces in 2011 fell into this category. Spaces renting between $2,000 and $2,499 per month represented 33.5 per cent of the total universe in 2012. Only 4.8 per cent of all seniors' rental spaces in the province charged less than $1,500 per month in rent.

Variations in services and amenities

All seniors' facilities surveyed offered some form of meal plan included in the rent. The majority of structures provided three daily meals with rent. However, at 51.6 per cent in 2012, the proportion of structures providing three daily meals was less than the 54.3 per cent of all structures that offered the similar service in 2011. The remaining 48.4 per cent of structures included two meals per day, representing an increase from 37.1 per cent of structures in 2011. On site medical services were available in 25.8 per cent of all structures while 16.1 per cent had a registered nurse on-site. Both of these services increased from the proportion of structures that offered these services in 2011. The most prevalent service was a 24-hour call bell, which was

Figure 3



Source: CMHC

available in 64.5 per cent of all structures in the province, in 2011 this service was available in 60.0 per cent of all structures. A small number of structures (6.5 per cent) had an on-site pharmacy, in last year's survey, this number was 5.7 per cent.

A majority of structures, or 87.1 per cent, had access to an exercise facility. This was the most commonly available amenity. Internet access was the next most common amenity offered, with 64.5 per cent of all structures in the province offering this service. This was followed by transportation services, which were available in 61.3 per cent of structures. Other services provided include movie theatres (45.2 per cent), and spa or hot tub (29 per cent). In all cases, larger buildings were able to offer more amenities than the provincial average.

With respect to ancillary services, cable television was included in the rent of 51.6 per cent of residences in 2012, whereas telephone service was included in the rent in only 6.5 per cent of residences. In 83.9 per cent of residences surveyed in 2012, telephone services had to be arranged by the tenant.

Universe

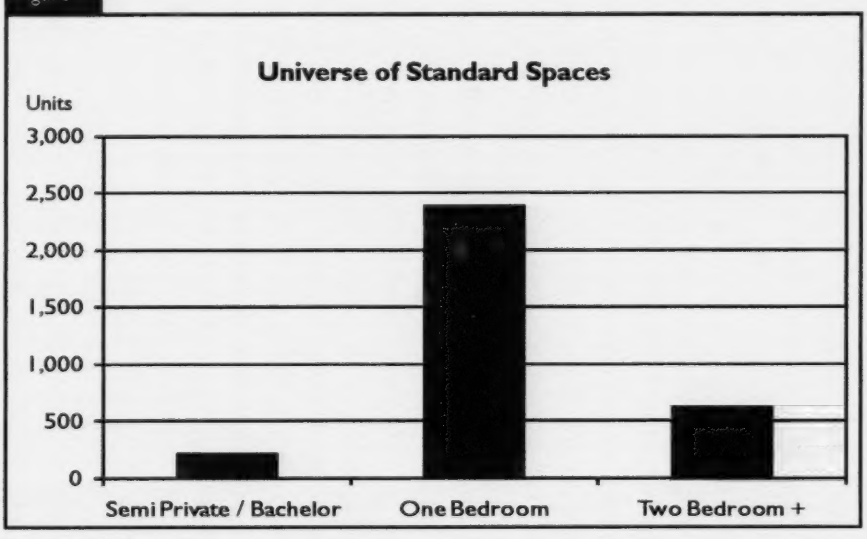
Survey coverage

The total number of seniors' residences surveyed across the province in 2012 was 31, which was down from 35 in 2011. This resulted in a 5 per cent decline in the total number of spaces to 3,473 in this year's survey. These housed 3,753 residents, which represents the equivalent of 4.3 per cent of Manitoba's estimated population over 75 years of age.

The majority of spaces, 70 per cent, are one bedroom spaces, followed by two bedroom spaces at 18 per cent, with semi-private and bachelor spaces making up the remaining 12 per cent. Most of the structures, 74 per cent, are of wood frame construction with the remaining structures comprised of concrete frame.

There were 3,215 standard retirement senior's spaces surveyed by CMHC in 2012, down seven per cent from the 3,446 standard spaces that comprised the universe in 2011. Standard spaces are defined as those where the resident receives less than 1.5 hours of care per day.

Figure 4



Source: CMHC

TABLES INCLUDED IN THE MANITOBA SENIORS' HOUSING REPORT

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1.1 Vacancy Rate (%) of Standard Spaces by Unit Type
Manitoba

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
Manitoba	--	--	5.5 a	7.5 a	7.9 a	4.6 a	4.5 a	4.4 a	7.1 a	4.8 a

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rate (%) of Standard Spaces by Rent Range ($)
Manitoba

Province	Less than $1,000		$1,000 - $1,499		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
Manitoba	**	--	2.9 a	++	2.5 a	2.3 a	4.2 a	5.4 a	15.4 a	6.0 a	7.1 a	4.8 a

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Manitoba

Province	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2011	2012				
Manitoba	3,473	6.7 a	4.5 a	31	3,753 a	86,400	4.3

[1] Source: Statistics Canada, Population Projections for Canada, Provinces and Territories, 2009-2036, Scenario 3.

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

2.1 Universe of Total Spaces by Unit Type
Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Manitoba	409	2,430	634	3,473

2.2 Universe by Unit Type
Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Manitoba	409	2,430	634	3,473
Standard Spaces	214	2,384	617	3,215
Non-Standard Spaces	195	9	1	205
Unknown Spaces	–	37	16	53

2.3 Universe of Standard Spaces by Rent Range ($)
Manitoba

Province	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 and more
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Manitoba	4.8 a	19.7 a	33.5 a	42.0 a

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Manitoba

Province	Meals				On-Site Medical Services	Registered Nurse onsite[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Manitoba	0.0 c	0.0 c	48.4 a	51.6 a	[illegible].8 a	16.1 a	64.5 a	6.5 a
10 - 49	**	**	**	**	**	**	**	** *
50 - 89	**	**	**	**	**	**	**	** *
90 or more	0.0 a	0.0 a	52.2 a	47.8 a	30.4 a	21.7 a	69.6 a	8.7 a

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] Registered Nurse on site means a RN, not a RPN or LPN.

2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Manitoba

Province	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Manitoba	61.3 a	0.0 c	29.0 a	45.2 a	87.1 a	64.5 a
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	69.6 a	0.0 a	34.8 a	52.2 a	100.0 a	78.3 a

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Manitoba

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
Manitoba	--	--	1,630 a	1,730 a	2,169 a	2,266 a	2,638 a	2,834 a	2,227 a	2,338 a

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

O1 Building Structure Makeup (%)
Manitoba

Province	Concrete Frame	Wood Frame
Manitoba	25.8%	74.2%

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Manitoba

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Winnipeg CMA	Cable	51.9	37.0	11.1	**
	Telephone	7.4	81.5	11.1	**
Rest of Manitoba	Cable	50.0	50.0	–	–
	Telephone	–	100.0	–	–
Manitoba	**Cable**	**51.6**	**38.7**	**9.7**	**
	Telephone	**6.5**	**83.9**	**9.7**	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Manitoba

Province	Before 1990	1990 - 1999	2000 or later	Total
Manitoba	**	**	4.5 a	4.8 a

O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Manitoba

Province		Before 1990	1990 - 1999	2000 or later	Total
Manitoba	Bachelor	**	**	1,717 a	1,730 a
	One Bedroom	**	**	2,315 a	2,266 a
	Two Bedroom +	**	**	2,796 a	2,834 a
	All	**	**	2,396 a	2,338 a

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

Methodology
Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2012 survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e., before January 2011
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C.)
- ✓ Offer an on-site meal plan
- ✓ Not provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ Have at least 50% of residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey, therefore, all seniors' residences in Canada meeting these criteria are included to be part of this survey.

Survey data were obtained through a combination of telephone interviews and fax and email responses. Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions
Space: A space is a residential area that is rented out. Examples of spaces include: one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space where the resident does not receive high-level care (i.e., the resident receives less than 1.5 hours of care per day.) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy Care Space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples include Alzheimer, Dementia and mobility support residents.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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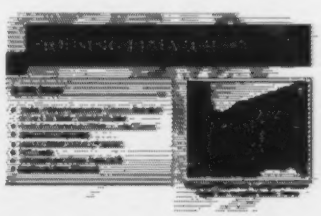

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